



There are very little, if any, configuration/setting changes needed. The process works in both UX and Classic environments. You will need the advanced Training Requests menu turned on by PLEX if not already on within your PCN.

1. Start by creating a new course, I've called mine *COVID Checkin*. No need to add the day of the week as when you look for records after the fact you will have all the days/dates.
  - a. Use the course outline to document any instructions for the trainer/screener
2. After the new course has been created, navigate to the 'Training Requests' screen. You'll want to click on the 'Quick Add' to add a new training session (that anyone will be able to join).

Employee  Reports To  Customer Employee No   
Building  Shift Group  Employee Status Active  
Course Code  Request Status  Admin Options No Value Selected  
Date Range 7/1/2020 - 7/1/2020

Quick Add Add a new Session Absent Student Log Print Upload Upload (Completed)

Requested By	Customer Employee No	Request Date	Course Description	Status	Priority	Note	Session No	Session Date	Session Time	Session Location
Type your search criteria above, then press Search to find matching items.										

3. Fill out the details for the date/time/instructors.

Print

QUICK ADD TRAINING SESSION -

Send Email notification on Add

TRAINING SESSION 1 -

Course Code \* COVID Checkin

Training Date / Time 7/1/2020, 4:02 PM

Internal Instructor Gilson, Mark

External Instructor

Note

Location



- This module is enabled for badge scanning, which makes it very easy to add users in any order to the training request. This speeds up the process when adding folks to the training.

COURSE INFORMATION

Course Code	COVID Checkin	Description	COVID Health Checkin	Delivery Method	In-House
Location		Duration	0	Session Length	0
Training Session	1	Training Date	7/1/2020, 4:02 PM	Note	

4:05 PM

Badge No  [Sign In/Out](#)

Student	Note	In Time	Out Time	Hours	Passed	Grade	Attended	Attach to Visitor
Gibson, Mark		4:05 PM			<input type="checkbox"/>		<input type="checkbox"/>	

Visitor

No Records Were Found.

- You can also take advantage of the 'Add Student/Add Visitor' to the session if the employee forgot their badge, or if you do not use badges at your location.

*TIP: If you don't use badges you can assign a temporary 4-digit number to folks during this time that they give during the scan process to speed up the tracking process.*

COURSE INFORMATION

Course Code	COVID Checkin	Description	COVID Health Checkin	Delivery Method	In-House
Location		Duration	0	Session Length	0
Training Session	1	Training Date	7/1/2020, 4:02 PM	Note	

4:05 PM

Badge No  [Sign In/Out](#)

Student	Note	In Time	Out Time	Hours	Passed	Grade	Attended	Attach to Visitor
Jameva, Carlos		4:06 PM			<input type="checkbox"/>		<input type="checkbox"/>	
Gibson, Mark		4:05 PM			<input type="checkbox"/>		<input type="checkbox"/>	
Kirby, Rosemary		4:06 PM			<input type="checkbox"/>		<input type="checkbox"/>	

Visitor

No Records Were Found.



6. Once your list is complete, you will want to indicate folks that have passed the screening and mark that they have attended. This will give them credit for the day.

COURSE INFORMATION

Course Code: COVID Checkin	Description: COVID Health Checkin	Delivery Method: In-House
Location: Training Session 1	Duration: 0	Session Length: 0
	Training Date: 7/1/2020, 4:02 PM	Note:

4:07 PM  
Badge No:  [Sign In/Out](#)

Student	Note	In Time	Out Time	Hours	Passed	Grade	Attended	Attach to Visitor
Amieva, Carlos		4:06 PM			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Gilson, Mark		4:05 PM			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Kerby, Rosemary		4:06 PM			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

Visitor: No Records Were Found.

[Cancel](#) [Apply](#)

7. You will then verify the attendance and grades (you do not need to fill in a grade).

8. You'll then be taken to a screen where you'll need to check the box to create a training history record. This is very important as it will push the record to the training records and give you a history by employee/day

Complete: Training History Record Created

Session No	Passed	Grade	In Time	Out Time	Approx. Hours	Attended	Note	Create Training History Record
Amieva, Carlos	<input checked="" type="checkbox"/>	0	4:06 PM		0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
		0.0	Passed :	Yes	0.00			<input checked="" type="checkbox"/>
Gilson, Mark	<input checked="" type="checkbox"/>	0	4:05 PM		0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
		0.0	Passed :	Yes	0.00			<input checked="" type="checkbox"/>
Kerby, Rosemary	<input checked="" type="checkbox"/>	0	4:06 PM		0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
		0.0	Passed :	Yes	0.00			<input checked="" type="checkbox"/>



- 9. Toggling the admin options to 'completed' and reviewing the student list we can see who passed/failed the daily check-in. You can use this method if you want to track someone who failed, or you can decide not to scan an employee who failed and just track those that passed.

Navigation: FLEX, Gibson, Mark, Revolution Group, Session Students, REV GROUP

Actions: Training Requests, Add Student, Add Visitor, Remove Student, Remove Visitor, Apply to all Notes, Apply to all Hours, Apply to all Grades, Attach to Visitor, Attachments, Student List, Training Notice, Kiosk Mode, Print

COURSE INFORMATION -

Course Code: COVID Checkin	Description: COVID Health Checkin	Delivery Method: In-House
Location	Duration: 0	Session Length: 0
Training Session: 1	Training Date: 7/1/2020, 4:02 PM	Note

4:40 PM

Badge No:  [Sign In/Out](#)

Student	Note	In Time	Out Time	Hours	Passed	Grade	Attended	Attach to Visitor
Amieva, Carlos	<input type="text"/>	4:06 PM		<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Gilson, Mark	<input type="text"/>	4:05 PM		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Kalister, Jennifer	<input type="text"/>			<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Kirby, Rosemary	<input type="text"/>	4:06 PM		<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>

Visitor

Visitor	Note	Attended
No Records Were Found.		